# The U.S. Sleep Market: A Market, Competitive & Operating Analysis

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- List of major private & public sector information source used

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  - Scope of sleep deprivation in America: prevalence rates of insomnia, causes, no. of sleep disorders, description of most common sleep disorders, NSF vs. other polls.
  - Nature of the field of sleep medicine and somnology: history/evolution of sleep labs, number, multiple-site chains, mkt. size 1997-2023 F
  - Why drug companies play a major role in publicizing sleep disorders and creating demand for Rx sleeping pills, mkt. size 1997-2023 F
  - Size and nature of the mattress & pillows market, new technologies, mkt size
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- Rx and OTC sleeping medications market: 1995-2023 F
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**Demographics of Persons With Sleep Disorders**

- Scope of affected population: no. and type persons with... insomnia, sleep apnea, narcolepsy, restless legs syndrome, no. of children, women, seniors with sleep disorders
- Findings of Natl. Sleep Foundation’s “Sleep in America” poll
- No. of hours of sleep daily, by race (Natl. Health Interview Survey)
- Prevalence of sleeping problems by major countries, U.S. vs. Europe, Japan
- CDC data/research confirms Americans’ lack of sleep: causes
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- Market Definition & Scope: the markets comprising total sleep market

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- The **Mattresses** Market
- The **Sleep Pillows** Market
- The **Sleeping Medications** Market
- The **Sleep Labs** Market; effect of CMS ruling, avg.
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- Prescription anti-insomnia drugs sales: 1995-2023 F
- Sleep Labs revenues, no. of labs, annual % change: 1995-2023 F

Sleep Labs Market

- What are sleep labs, how many?, evolution & nature of the field, polysomnograms test description, accredited vs. non-accredited centers
- Launching a new sleep lab – the process/key considerations, capital needed, choices for hospital or MD affiliations
- The effect of Medicare approval of home tests: discussion, type of devices
- What patients can expect at a sleep lab: type tests (PSGs, split night studies, MSLTs, CPAP titrations), role of sleep techs, follow-up
- How to find A sleep lab
- 2014-2018 quarterly surveys of sleep lab metrics: patient volume, bed count (Needham & Co.)

Tables
- Sleep Labs revenues, no. of labs, annual % change: 1995-2023 F

Results of Past Marketdata U.S. Sleep Labs Survey

- Type of sleep lab (percent of total: hospital-based, practice-based, university-based, independent / free-standing
- Average number of PSGs (sleep studies, CPAP titrations and MSLTs) performed in 2006, 2007
- Average number of beds operated and average days/nights per week operated
- Number of patients the sleep lab would be able to test/titrerate per week
if operating at 100% occupancy, 7 days/night per week (average)
- List of Sleep centers’ biggest issues or problems
- Expected effect of March 14 decision by CMS to provide Medicare reimbursement for home sleep studies using portable devices to have on their lab’s future

- Average fees a sleep lab charges for: PSG sleep study, CPAP titration study, MSLT
- Reimbursement – avg. amount a sleep lab receives for: PSG sleep study, CPAP titration study, MSLT
- Percentage of a sleep lab’s total sleep diagnostic revenue that comes from: commercial insurance, Medicare/Medicaid, patients

- Average sleep lab’s diagnostic revenues in 2007
- Whether sleep labs have an affiliated company that provides PAP set-ups for their patients and generates sleep therapy revenues, number of PAP set-ups performed in: 2006, 2007

- Whether economic recessions affect a sleep lab’s business?
- Percentage of a sleep lab’s patient base that is male vs. female
- Age of a sleep lab’s most typical patient (% by age class)
- The contributing factors to a sleep lab patients’ sleep disorders (% by type: obesity, large neck size, nasal/airway obstructions, etc.)
- Percentage of sleep labs that treat these disorders: sleep apnea, insomnia, restless leg syndrome, narcolepsy, periodic limb movement
- Whether sleep labs collect outcome data

Competitor Profiles (description and history of company, no. of labs operated, address, specialties, acquisitions, services, financials when available)

- SleepMed, Inc.
- Sleep Holdings
- Foundation Surgery Affiliates, LLC
- Novasom
- Nocturna Sleep Center

Sleep Lab Technicians Salary Trends
- Descriptions of the major staff positions, training required (sleep tech, technologists)
- Findings of Sleep Review Magazine’s salary survey, average salary and ranges for: RPSGTs, sleep techs, respiratory therapists, sleep physicians, sleep center directors, supervisors, managers: by tenure, by day/night shift, by age (2015 vs. 2007)

Table
- Salary by job title, by region: - 6 staff positions

Sleep Medications Market

- Summary: discussion of number of prescriptions written, mkt. potential, prime drivers of mkt. demand, performance of Belsomra
- Hurdle to overcome: past negative image of sleeping pills, long-term use, FDA fears vs. drug company efforts
- Advertising drives consumer demand: amount spent advertising the top 3 brands, Sanofi’s success with Ambien
- Research - New meds on the horizon: Ramelteon (Takeda), Provigil (Cephalon), Silenor (Somaxon), Volinanserin (Sanofi) - discussions of their usage/how they work, $ potentials, FDA approval status, setbacks for Indiplon (Neurocrine
Biosciences) and **Gaboxadol** (Merck)
- Description of the major Rx sleeping Pill Brands (Ambien, Lunesta, Rozerem, benzodiazepines, melatonin receptors, antidepressants)
- OTC Retail Sleeping Pills: discussion

**Tables:**
- sales of prescription and retail anti-insomnia drugs: 2002-2023 forecast
- sales of prescription anti-insomnia drugs, by brand
- sales of Ambien, Ambien CR: 1998-2008 (in Euros and dollars)

**The Sleep Apnea Devices Market**

- **Summary** - **Background of Sleep Disordered Breathing:** mkt. penetration in U.S. vs. abroad, estimates of mkt. size by industry analysts/competitors
- **Product Definitions:** **CPAPs** (continuous positive airway pressure devices), types of masks & mouthpieces used
- **Market Trends:** the home test mkt., comments by Wachovia analysts regarding potential and uncertainties in view of CMS ruling, move to smaller devices
- **Market Size:** likely effects of CMS ruling, estimates of growth rates in U.S. vs. Globally, Marketdata forecasts for 2008, 2012, positives/negatives
- The Major Respiratory Equipment Device Competitors: address list.

**Competitor Profiles** (company descriptions, divisions, specializations, 2015-2017 revenues, outlooks)
- Resmed
- Respironics

**Tables**
- Sleep apnea devices (CPAPs) sales: total, ResMed. Respironics, other companies: 1995-2012F

**The Mattress & Pillows Market**

- **Summary & Status of the market:** a steady replacement business, new technology And sales/distribution outlets, e-commerce, bedding retailers disruption.
- **Market Size & Growth:** 2016-2017 performance, ISPA industry wholesale shipments, 2017-2018 outlook by ISPA, retail sales forecast, 2023 Marketdata forecasts, effects of housing slump
- Differences in mfg. technologies used by the major mfrs., visco, latex
- List and sales of top 5 bedding retailers
- The Ultra-premium mattress market: growth rate, % of sales, Vividus, Hypnos Beds

**Competitor Profiles** (company description, capabilities, specialties, historical revenues, mergers, mkt. share, distribution, outlooks, recent financials, etc.)
- **Tempur Sealy Intl.**
- **Sleep Number (formerly: Select Comfort)**
- **Simmons Serta**
The Sleep Pillows Market
- Discussion of new pillow designs, materials, pricing, mkt. trends
- The Sona pillow
- Estimated retail market size: 1997-2023 F

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- U.S. Wholesale sales of mattresses & foundations, % change, dollars: 1987-2017
- Non-innerspring mattress unit and dollar shipments
- Estimated RETAIL sales of mattresses: 1987-2023 F
- Personal consumption expenditures for furniture & bedding: 1987-2016

Retail Sleep Devices Market
- Summary
- Sleep Lamps/Light Therapy Market: use for seasonal affective disorder, dawn simulation, evolution of “light boxes”, mkt. status & leading mfrs., mkt. size, list of 9 major competitors, Company Profile: Apollo Health
- Sound Machines/White Noise Machines Market: use and technology, applications, history of development, emergence of Marpac as industry leader, list of catalog retailers selling machines (Brookstone, Hammacher Schlemmer, etc.), market size/growth.
- Eye Shades and Sleep Masks: leading competitors (Dream Essentials)
- Earplugs Market: mkt. size, leading mfrs./distributors/retailers
- Sleep Pods: Yelo & MetroNaps sleep lounges appearing in metro markets
- Sleep/Insomnia Books Market: list of titles
- Sleep apps for smartphones, leading apps
- Miscellaneous Retail Products & Services: how hotels & spas are making rooms “sleep friendly” – examples of programs/services offered.

Reference Directory of Sleep-related Trade Groups, Experts, Journals
- List of sleep market national/regional trade associations, journals, consulting firms, brokerage analysts, other key contacts – address & phones, description of activities.
- Profiles of Michael J. Breus, Ph.D. and Duane M. Johnson, Ph.D.